*MANITOBA TRAVEL MARKET SURVEY

- SUMMARY REPORT -

September, 2000

PROBE

RESEARCH INC.

101-00894/

Summary Introduction

This comprehensive public opinion study surveys ten distinct markets of interest to Manitoba's tourism industry. In each of the five markets in Canada and the U.S., specific attitudinal and behavioural patterns with respect to Manitoba's travel and tourism market have been observed. This research provides a scientific basis for the development of communications and promotional efforts that best address the needs of specific segments of the tourism market.

A thorough examination of the views of former visitors to Manitoba reveals that nine in ten tourists are satisfied with their experience in this province and that a comparable number indicate they will make a return visit to Manitoba. This positive finding exists within a larger context whereby in Manitoba, opportunities in tourism and pleasure travel markets are greatly influenced by access and proximity. Briefly, exposure to Manitoba and its tourist offerings diminishes with geographic reach.

Exploring Manitoba's tourist potential also reveals that more than one-half of those who have *not* visited Manitoba to date remain open to the idea of such a trip, even if only around one in ten of these potential new visitors express a deeper interest in actually coming. Furthermore, there are widely varying levels of awareness and appreciation of Manitoba travel and tourism features among non-visitors.

This province is acknowledged as possessing some tourist amenities such as lakes, quality hunting and fishing and relative isolation. These attractions, however, resonate only with smaller market sub-groups or tourism niches. Additionally, some of Manitoba's most visible and celebrated tourist features (festivals, beaches, golf opportunities) remain undervalued by large numbers of potential visitors.

BACKGROUND AND METHODOLOGY

Probe Research Inc. was commissioned by the Manitoba Government's Department of Culture, Heritage and Tourism to undertake qualitative and quantitative research in Manitoba's major external pleasure travel markets. The findings contained in this report pertain to a comprehensive quantitative survey of 2200 adults within ten distinct U.S. and Canadian travel markets. Specific areas of enquiry examined in this research include:

- *Traveller and Visitor Profiles*
- *Awareness Dimensions*
- *Travel Market Potential*
- *Tourism Features and Amenities*
- *Media Utilization.*

Telephone interviews were conducted from a central data collection facility located in Winnipeg, Manitoba between May 23 and June 21, 2000. Random digit dialing was employed to ensure adult respondents in all markets would have an equal opportunity to participate in this research.

The sample disposition across markets and the associated margins of error are presented in the table below:

Market	*Completed Interviews*	*Margin of Error*
Greater Toronto	200	±6.93
Sault Ste Marie	200	±6.93
Thunder Bay	200	±6.93
Regina	200	±6.93
Saskatoon	200	±6.93
North Dakota	400	±4.90
Minneapolis/St. Paul	200	±6.93
Minnesota (Rural)	200	±6.93
Denver	200	±6.93
Chicago	200	±6.93

TRAVELLER PROFILE

Respondents who had travelled outside of their home state or province in the past 36 months were presented with a line of inquiry that provided a profile of destinations and the reasons for specific destination choices; travel group composition; seasonal travel preferences; mode of transportation and accommodation, and the most frequently enjoyed vacation activities.

Destination Rationale

- A variety of reasons were offered when respondents were called upon to provide reasons for choosing the location of their last out of province or state visit. Chief among these travel motives was "visiting friends or family" – mentioned by nearly six in ten respondents (58%).

RATIONALE FOR RECENT TRIP
- Total Mentions -

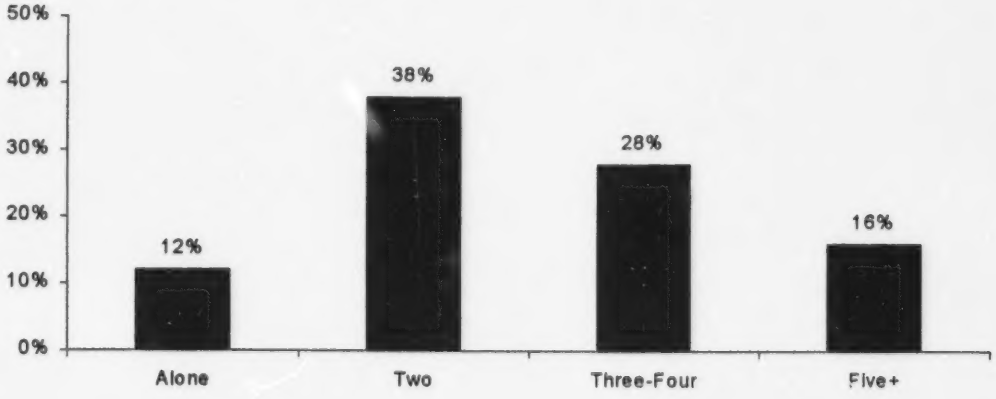
	Total	Canada	U.S.A.
Base	(1800)	(781)	(1019)
	(%)	(%)	(%)
Visit Family/Friends	58%	55%	61%
Cultural Activities	14%	16%	8%
Rest/Relaxation	9%	11%	8%
Outdoor Activities	9%	8%	9%
Climate	6%	7%	6%
Business	6%	6%	6%

Group Composition

- Travellers are most likely to have made their last journey in the company of one other person (38%). Just over one in four (28%) travel with a party of three to four people, while only 16 percent travel with a group of five or more people. Travelling alone outside of a home state or province was also comparatively less common (12%).

Group Composition

Q.7 "How many people were in your travel party when you last took a trip outside your (state/province)?"

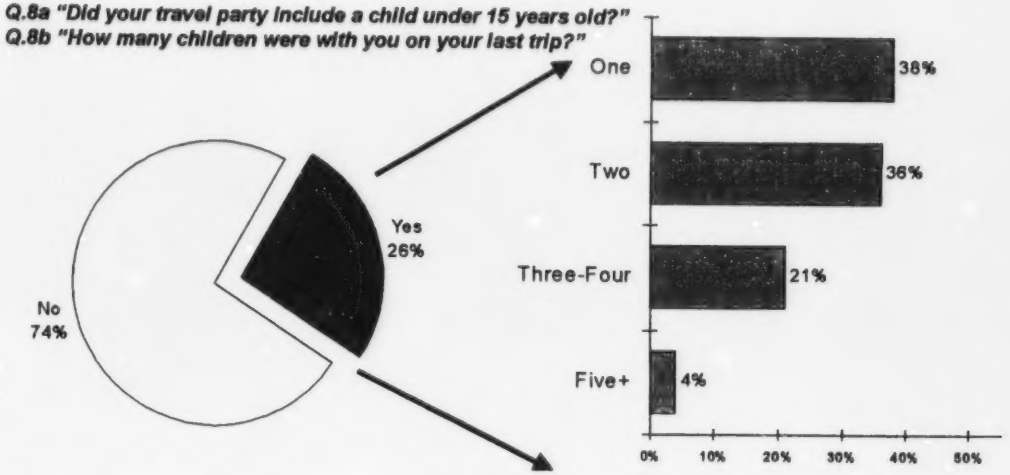


Incidence of Children in Party

- Overall, one in four (26%) travellers were accompanied by a child under 15 years of age on their last trip out of their home province or state.

Presence of Children on Trip

Q.8a "Did your travel party include a child under 15 years old?"
Q.8b "How many children were with you on your last trip?"

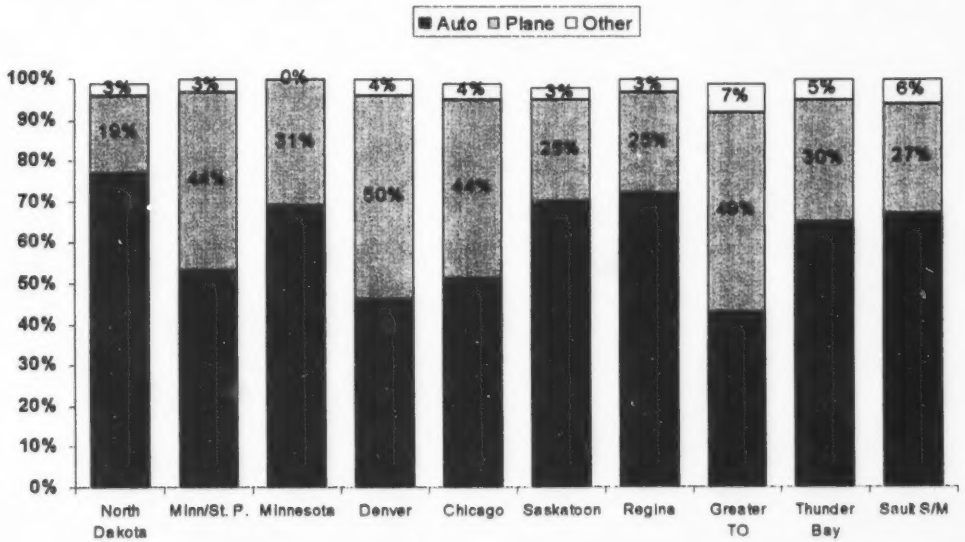


Transportation Mode

- When travellers were asked about the form of transportation they use most often for trips outside of their home province or state, cars top the list of possible options at 63 per cent. One-third, or 33 per cent, of the vacationing public usually fly when they travel. Only two per cent take the bus, while one per cent use the train and a further one per cent travel by motorhome.

Typical Transportation Mode

Q.11 "And what form of transportation do you use most often for trips outside the state/province?"

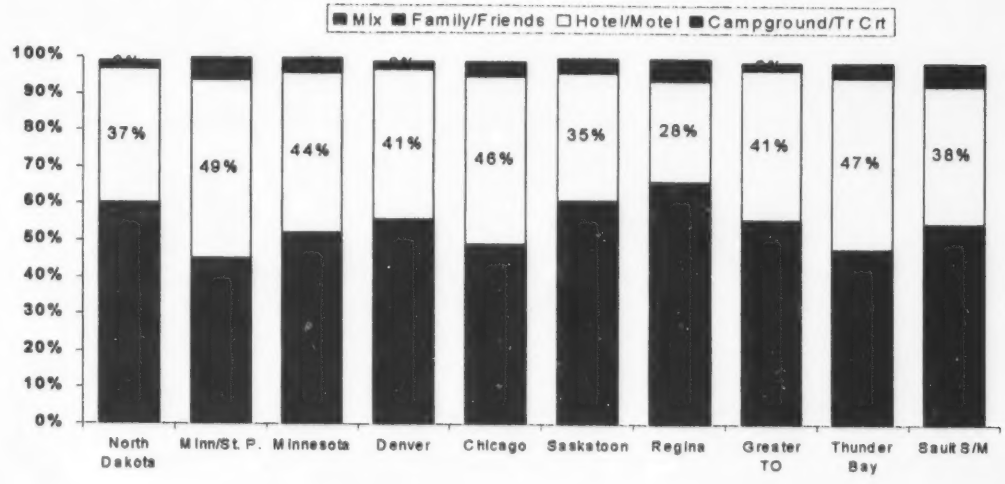


Accommodation Type

- Four in ten travelers report typically staying at either a hotel (26%) or a motel (14%) when they travel outside of their home province or state. Nearly one in three (31%) indicate that they stay at a variety of accommodations, while 24 per cent stay with family and friends.

Accommodation Preference

Q. 12 "When you travel outside of (state/province), where do you stay most often?"



Vacation Activities

- "Dining out" (95%) was reported to be the most frequently enjoyed vacation activity regardless of where travellers originate. "Going shopping" (79%) is typically the second most frequently enjoyed activity, while "Going to the beach" (71%) was generally the third most preferred activity, followed by "Museums" (66%).

TYPICAL VACATION ACTIVITIES

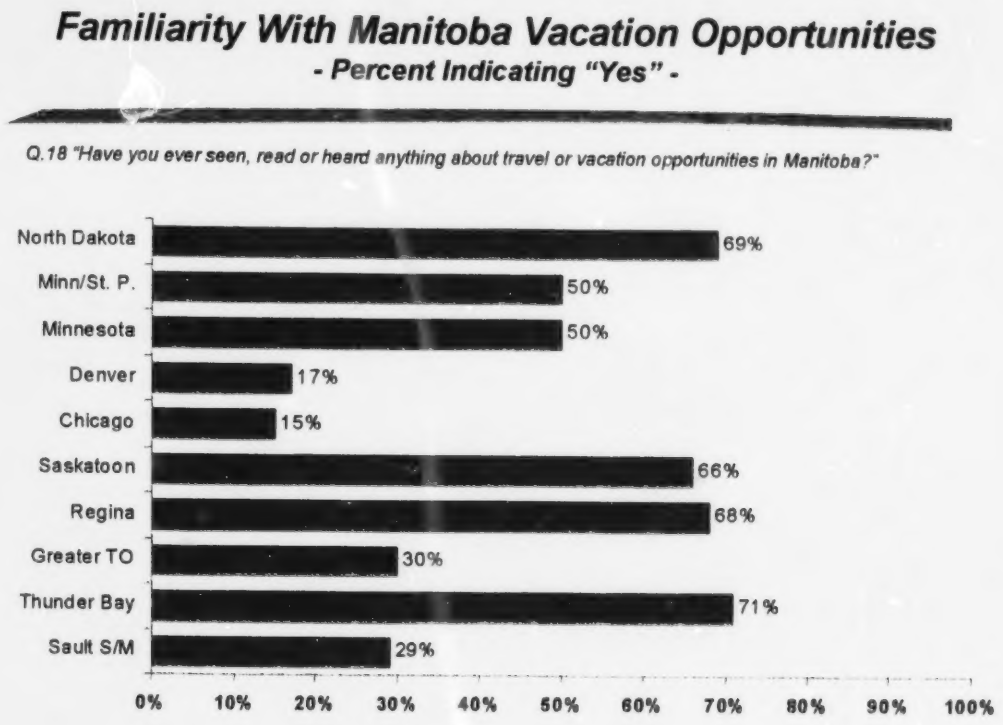
		UNITED STATES					CANADA				
	Total	ND	M S/P	Mn	Denver	Chicago	Saskatoon	Regina	Greater T/O	Thunder Bay	Sault SM
	(1800) (%)	(345) (%)	(173) (%)	(155) (%)	(165) (%)	(181) (%)	(179) (%)	(165) (%)	(157) (%)	(143) (%)	(136) (%)
Dining out	95	95	92	89	99	97	94	94	97	95	97
Shopping	79	78	71	71	71	81	82	84	82	79	85
Beach	71	56	78	64	64	75	77	78	87	76	79
Museums	66	67	59	66	68	67	68	60	73	66	59
Festivals	57	59	55	53	61	64	51	42	66	63	55
Camping	49	48	45	51	50	36	67	51	37	47	58
Attending cultural events	46	41	38	36	44	57	41	44	59	54	58
Exp. winter activities	30	28	30	31	36	31	38	29	31	24	27

"Now I am going to give you a list of vacation activities. For each of these activities, please tell me whether or not your holidays typically include these things.

Awareness of Manitoba Vacation Opportunities

Familiarity With Manitoba Vacation Opportunities

- Approximately one-half of surveyed travellers (49%) on both sides of the Canada-U.S. border indicated that, at some point, they had seen, read or heard something about travel or vacation opportunities in Manitoba. There is a general correlation between geographic proximity to Manitoba and self-reported awareness of vacation information.

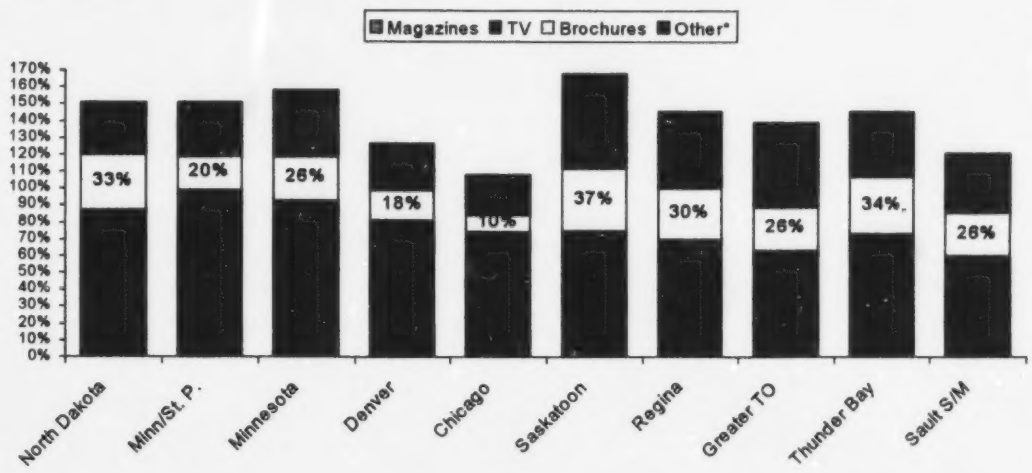


Sources of Manitoba Travel and Vacation Information

- Among survey respondents who had heard or seen something about travel or vacation opportunities in Manitoba, the greatest number (45%) pointed to "magazines or newspapers" as their source of information. A somewhat smaller proportion volunteered "television" (35%) followed by "brochures" (29%).

Sources of Manitoba Travel Information

Q.19 "To the best of your recollection, where did you find this information on travel in Manitoba?"



Multiple Responses accepted

***Other includes Internet, Direct Mail, Travel Agent, Auto Club, Other Specified**

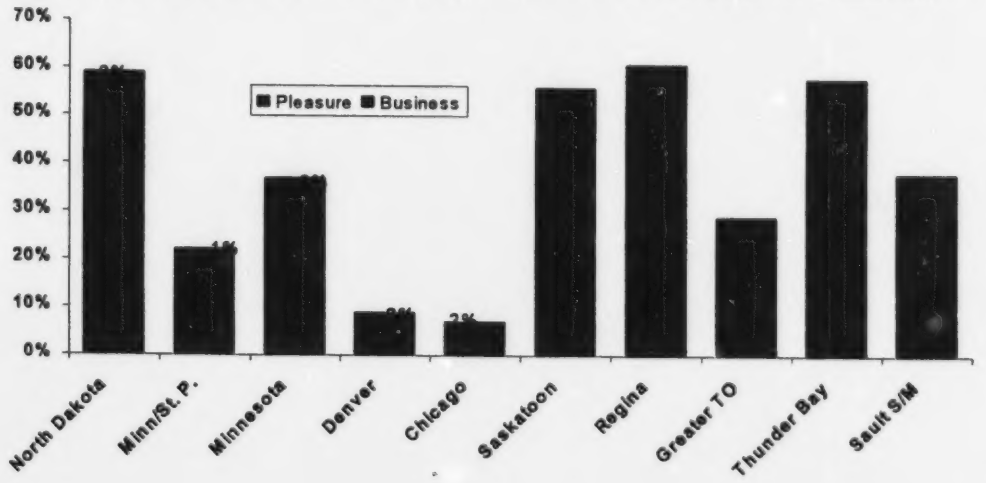
Manitoba Visitation

Incidence of Manitoba Visitation and Trip Purpose

- Pleasure vacations were most frequently cited as the purpose of respondents' trips to Manitoba. Among respondents who had visited Manitoba, 42 per cent of Canadians and 30 per cent of Americans had been here for pleasure purposes.

Purpose of Manitoba Visits

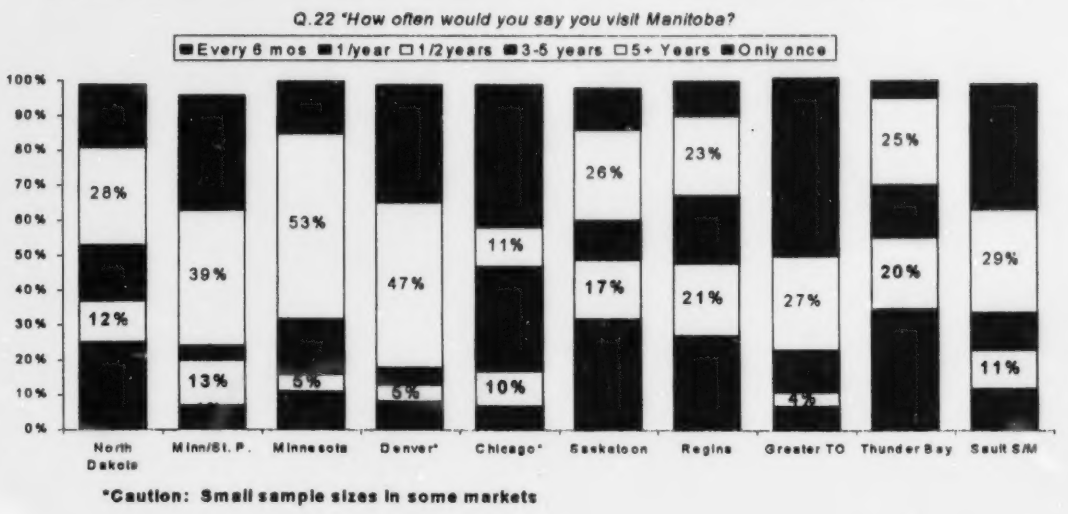
Q.20 "Have you ever been to Manitoba as a pleasure visitor or for the purposes of business? "



Visitation Frequency

- For many of those who had previously visited Manitoba, these trips are not a regular part of their travel routine. Overall, only 24 per cent said they come to Manitoba once per year or more. Indeed, in six of the ten travel markets examined, more than half of these former visitors said they had only been to Manitoba once or that these visits took place at only five year or longer intervals.

Frequency of Manitoba Visits



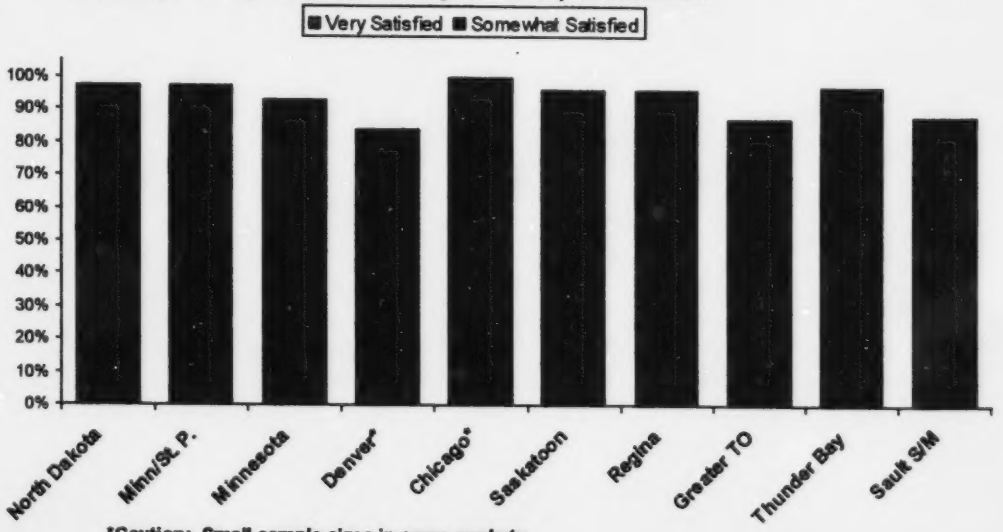
*Caution: Small sample sizes in some markets

Trip Satisfaction

- Overall satisfaction with the last trip to Manitoba was very high across all regions and sub-groups of surveyed respondents. Ninety-seven per cent of visiting Americans reported being "very satisfied' (68%) or "somewhat satisfied" (29%) with their last trip to Manitoba. Similar proportions of Canadians also rated their last Manitoba trip as being "very" (60%) or "somewhat" (34%) satisfactory.

Satisfaction With Manitoba Visit

Q.26 "Overall, would you say you were very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with your last trip to Manitoba?



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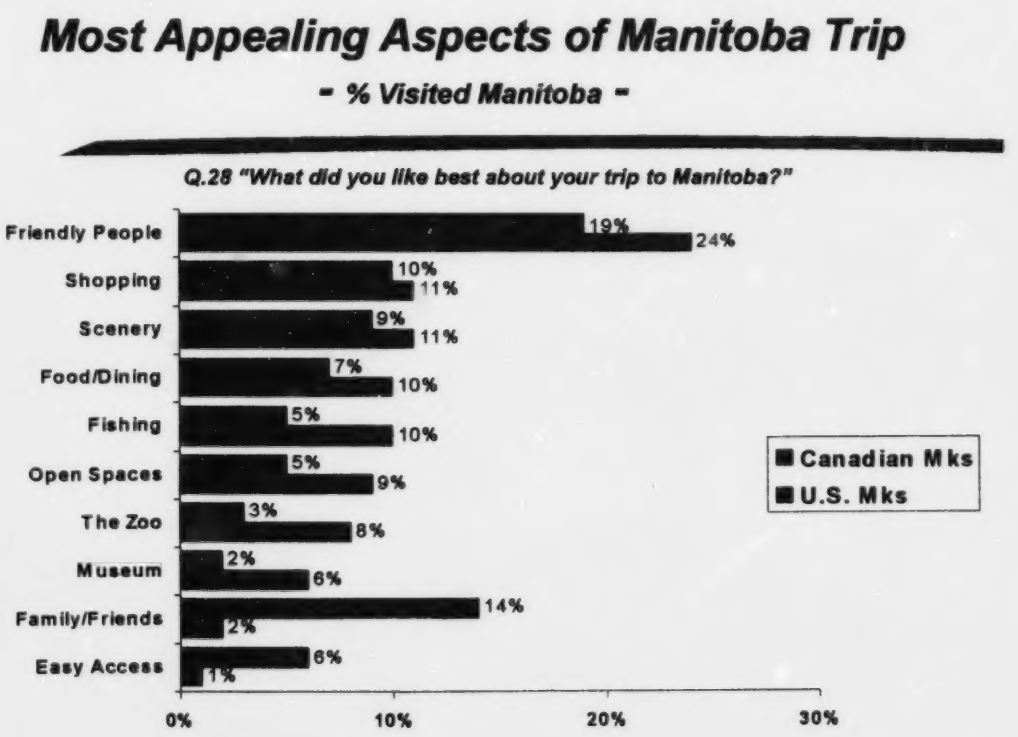
Most Appealing Aspects of Manitoba Visit

- When respondents were asked what they liked most about their last Manitoba visit, 24 per cent of Americans and 19 per cent of Canadians reported the "friendly people." "Shopping" was also rated high with 11 per cent of U.S. respondents and 10 per cent of Canadians suggesting this was a Manitoba highlight.



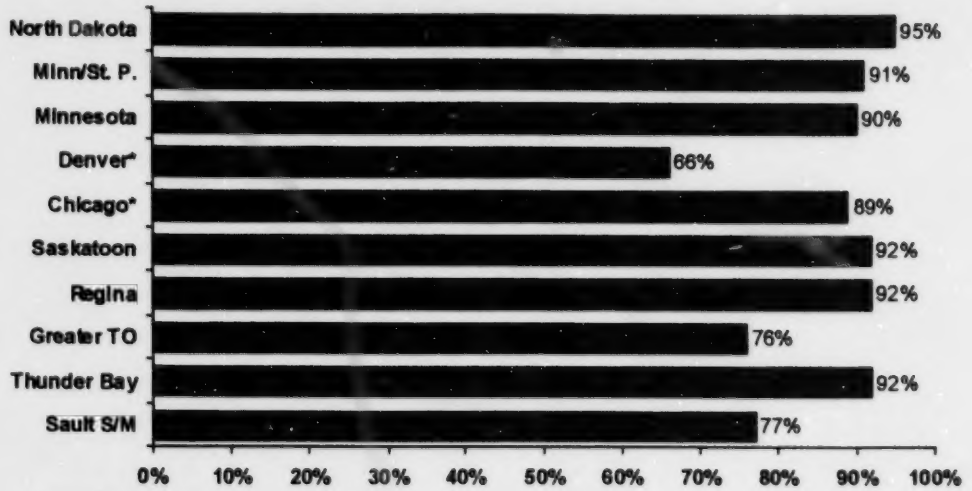
Intention to Revisit

- Among those who have visited Manitoba sometime in the past, 92 per cent of Americans and 88 per cent of Canadians indicated that they would return to Manitoba for a future visit.

Incidence of Intended Revisits

- Percent Indicating "Yes" -

Q.27 "Would you take another trip to Manitoba?"



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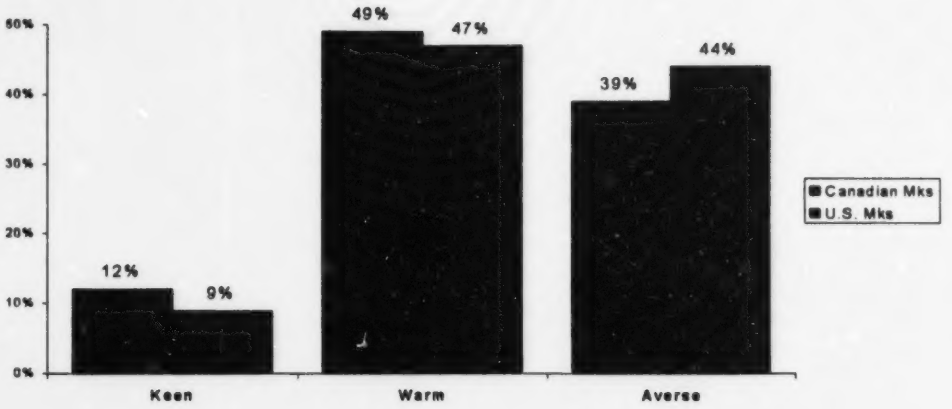
Manitoba Travel Market Potential

Likelihood of Future Visits

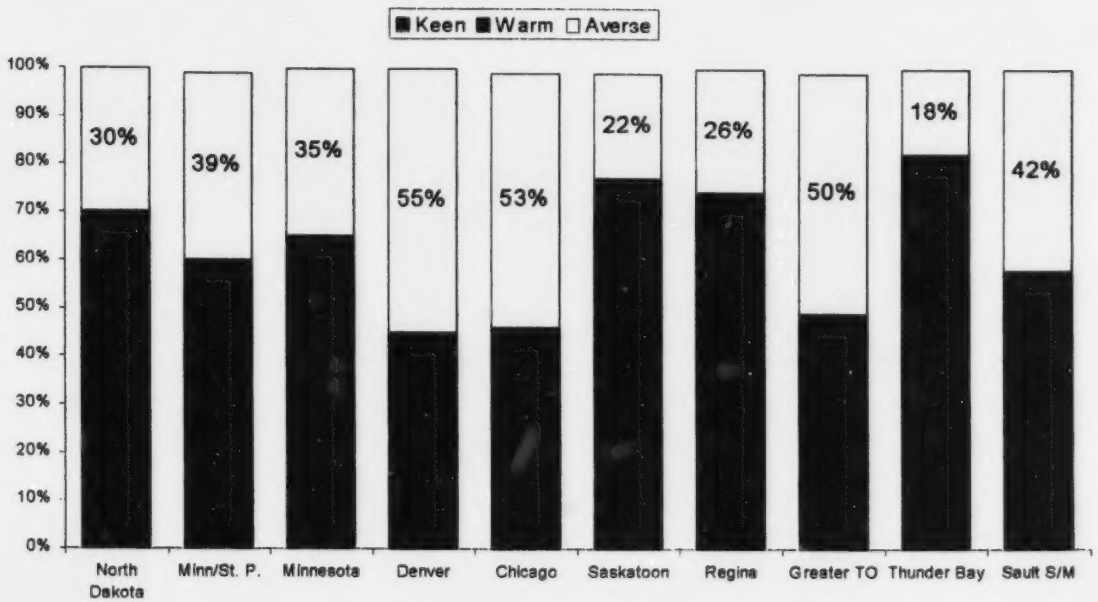
- Those who had not yet visited Manitoba were asked to indicate the likelihood of a future visit to this province. Across all markets, nearly half (47%) of non-visitors to Manitoba regard Manitoba as a destination option among many, while nearly as many (43%) have little interest in ever visiting this province. Fully one in ten (10%) however, regard Manitoba as a likely future destination.

Overall Likelihood of Manitoba Visit Among Current Non-Visitors



- Among those who have yet to visit Manitoba, residents of neighbouring areas and cities were comparatively more likely to indicate that they may be making a trip to this province sometime in the future.

Potential Visitation Segments

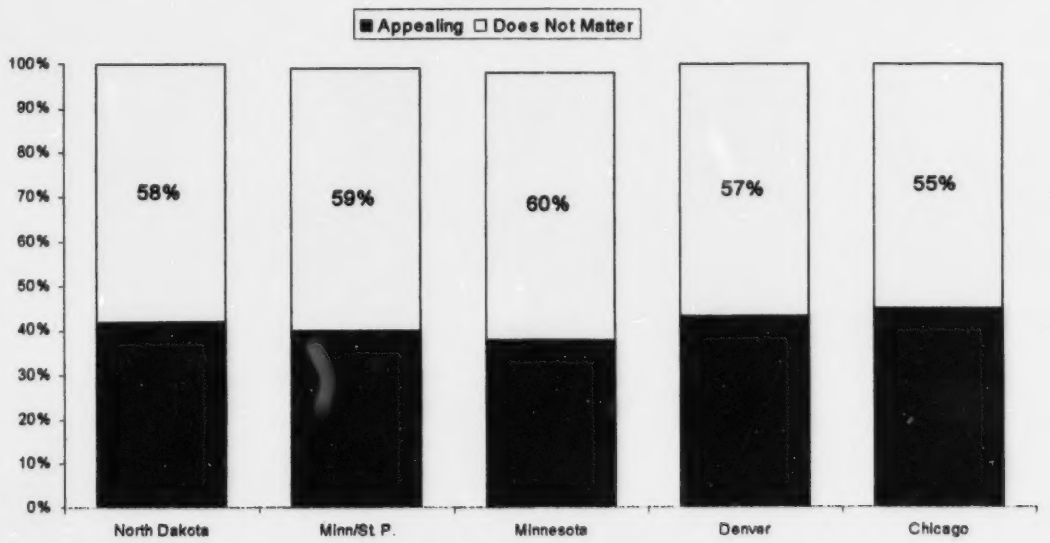


Impact of Dollar Differential

- A small majority of U.S. survey participants (58%), reported that the fact that the U.S. dollar is worth approximately 45 per cent more in Canada than in their home country did not make travel to a Canadian destination more appealing. However, more than two in five surveyed Americans (42%) indicated that this positive currency position enhanced the appeal of Canadian travel destinations.

Impact of Currency Differential on Travel Behaviour - U.S. Travelers -

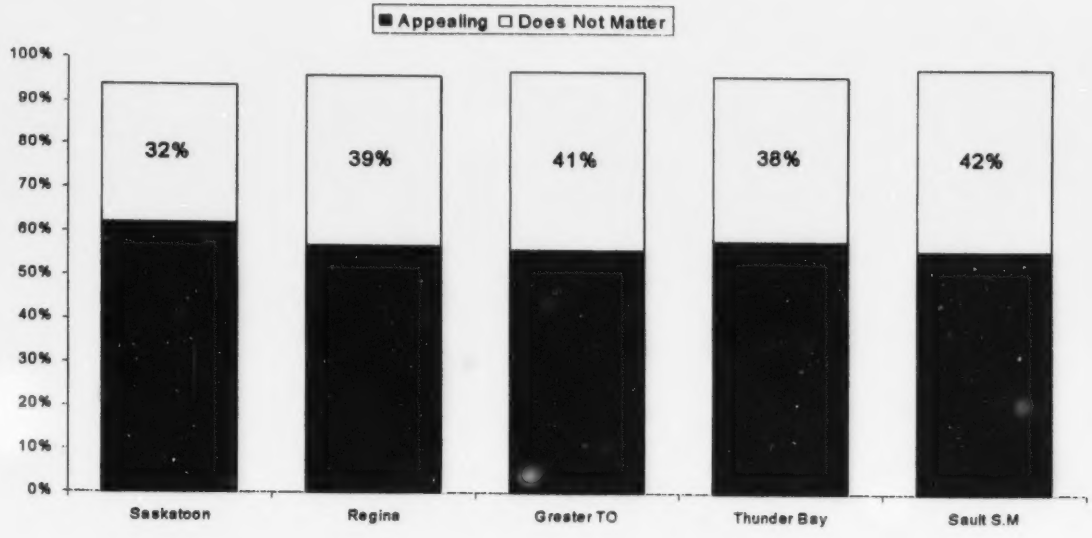
Q.33 "In fact, your dollar is worth approximately 45% more in Canada than in the United States. Does this fact make Canadian travel destinations more appealing to you or does this really not matter to you?"



- Among Canadians, the difference in currency made Canadian travel destinations even more appealing. Overall, 58 per cent of Canadians found staying in Canada to be more attractive due the low U.S. exchange value.

Impact of Currency Differential on Travel Behaviour - Canadian Travelers -

Q.34 "As you may know, the Canadian dollar is worth approximately 45% more in Canada than in the United States. Does this fact make Canadian travel destinations more appealing to you or does this really not matter to you?"



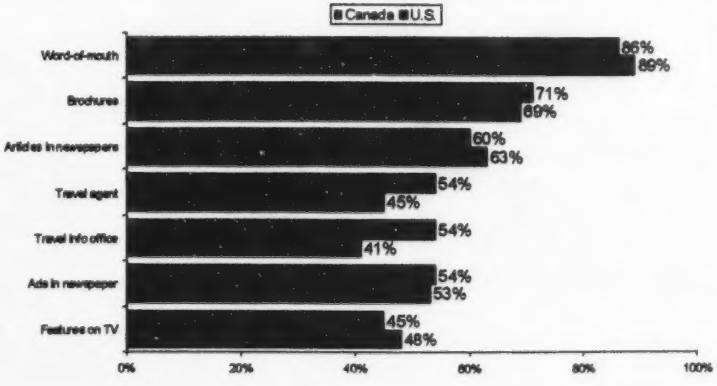
Media Utilization

Travel Planning Information Resources

- Respondents who had travelled outside of their home province or state in the past three years were presented with an extensive list of potential vacation planning information sources. A very strong majority of recent travellers state that they incorporate "word-of-mouth" (88%) information when making vacation plans. Other sources of information used by more than half of travelers include "brochures" (70%), "articles in newspapers and magazines" (62%), and "advertisements in newspapers" (53%).

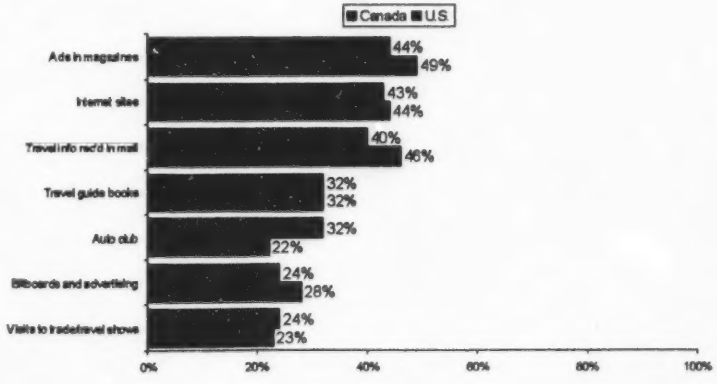
Use of Selected Vacation Planning Information Resources
- Per cent indicating "Yes" -

Q.40 "When planning a vacation or looking for information on places to visit, which of the following resources do you use? Do you get your travel information..."



Use of Selected Vacation Planning Information Resources (cont'd)
- Per cent indicating "Yes" -

Q.40 "When planning a vacation or looking for information on places to visit, which of the following resources do you use? Do you get your travel information..."



Conclusions

- Of former visitors surveyed, nine in ten indicate that they were satisfied with their visit to Manitoba and a comparable number indicate that they would make a return visit to Manitoba.
- Tourism traffic is greatly influenced by access and proximity.
- Exposure to Manitoba's tourism product diminishes with distance.
- While Manitoba boasts a number of key tourism amenities, these qualities suffer from a lack of distinction and are commonly found in competing surveyed markets (safety, cleanliness, family orientation, etc.).
- Some celebrated Manitoba tourism products (festivals, beaches, golf, etc.) are undervalued by a number of potential visitors.
- One half of respondents who have not visited Manitoba remain open to visiting Manitoba with one in ten expressing a deep interest in visiting.